

**SYSTEM AND METHOD FOR A PLANNER**

**CROSS REFERENCE TO RELATED APPLICATIONS**

- [1] This application claims priority, under 35 U.S.C. § 120, to United States Patent Application Serial No. 10/440,521, filed May 16, 2003, and entitled SYSTEM AND METHOD FOR A PLANNER.

**FIELD OF THE INVENTION**

- [2] The invention relates to a planner, and, more specifically, to a system and method for generating and planning events, meetings, or related series of meetings.

**BACKGROUND OF THE INVENTION**

- [3] Today's business environment demands that effective interactions occur between business principals and management, peers, subordinates, supporting departments, suppliers, customers, clients, and authorities. Often, these interactions are organized as meetings between individuals or groups at various locations, and

under varying circumstances. The planning and execution of such meetings, and the associated logistics, can become very disorganized and costly if important parameters are missed, if records are lost, or if the meeting planning becomes so complex that many meeting staff members need be employed to realize the event. Additionally, the organization and accounting of costs associated with the organizing of the event, the event location rental, the payment of speakers, the cost of services, such as food, lodging, administrative cost, mailings, to mention a few, are often overlooked, not well controlled, or badly managed and/or recorded. One criticism that meeting planners and attendees often express concerns the distribution of basic updated information concerning a meeting. For example, as meeting planning becomes more mature, problems may arise with venue, the availability of speakers or attendees, or services, such that the place, time, and content of a meeting, may change. Dissemination of this basic knowledge to all who are interested in a meeting is key to maintaining coherency in planning and harmony among planners, customers and attendees alike. Channels of communication between planners in different companies and divisions in different cities is an additional problem that must be overcome.

[4]                    Thus, there is a need for an invention that provides an integrated solution for event planning, organization, execution, and cost accounting. The present invention attempts to address these concerns by providing an integrated, remote, application that can assist event planners in conceptualizing, organizing, realizing, and monitoring event planning and execution, and data gathering.

## **SUMMARY OF THE INVENTION**

[5]                    The present invention includes an planner apparatus. The planner apparatus includes a project management module, wherein at least one information item associated with the event is generated, an event logistics module, wherein at least recruiting of individuals for attendance at the event, selection of venue and speakers for the event, and travel logistics for the event, in accordance with the at least one information item, are monitored, at least one database, wherein the at least one information item, and wherein at least one of the recruiting, venue, speakers, and travel logistics are stored, a fulfillment request module, wherein fulfillment of tasks associated with the at least one database is performed, and a reporting module, wherein data associated with the event, in accordance with the at least one information item and at least one of

the recruiting, venue, speakers, and travel logistics, is provided to a user.

[6]                   The present invention additionally includes a planning system. The planning system includes at least one business rule remote from at least one client, a meeting editor, wherein at least one meeting may be generated for the at least one client by the meeting editor in accordance with at least one of the at least one business rule, and at least one tracker communicatively connected to the meeting editor, wherein the at least one tracker tracks at least two data items selected from the group consisting of invitees to at least one of the at least one meetings, respondents to invitations to the meeting, at least one speaker of the meeting, at least one host of the meeting, finances of the meeting, and a venue of the meeting, and wherein the at least one tracker communicates the at least two data items with the meeting editor.

[7]                   The meeting editor may include a meeting set-up module for setting up each meeting, a meeting manager for managing each set-up meeting, a fulfillment request form manager, a reporter, an attendance listing manager, an invitee listing manager, a speaker listing manager, task listing manager, or a security listing manager, and a selector for selecting at least one of the invitees to at

least one of the at least one meetings, the respondents to invitations to the meeting, the at least one speaker of the meeting, the at least one host of the meeting, the finances of the meeting, and the venue of the meeting for tracking by the tracker.

[8]                   The at least one tracker may include at least one database for each meeting. The at least one database may include at least one data attribute selected from the group consisting of a meeting code for the meeting, and at least one of a meeting date, a meeting time, a meeting type, a meeting status, a meeting number, a client meeting number, or data attributes of the at least one speaker and the venue, wherein at least one of the at least one speaker and the venue are relationally linked to at least one of the meeting code and the meeting date. The planning may additionally include a finance tracker.

[9]                   The present invention may additionally include a method for planning a meeting utilizing an application remote from a planner of the meeting. The method may include the receiving of a logging onto the application, receiving a meeting identifier, receiving a selection of at least one venue for the meeting, receiving an identification of participants for the meeting, sending the participants invitations to the meeting, assembling statistics on replies to the

invitations, sending reminder notices to the participants upon the assembling of statistics, tracking expenses for the meeting, and generating reports concerning the meeting.

### **BRIEF DESCRIPTION OF THE DRAWINGS**

- [10] Understanding of the present invention will be facilitated by consideration of the following detailed description of a preferred embodiment of the present invention taken in conjunction with the accompanying drawings, in which like numerals refer to like parts and in which:
- [11] Figure 1 is a block diagram of the present invention;
- [12] Figure 2 is an embodiment of a display of the current invention;
- [13] Figure 3 is an embodiment of a display of the current invention;
- [14] Figure 4 is an embodiment of a display of the current invention;
- [15] Figure 5 is an embodiment of a display of the current invention;
- [16] Figure 6 is an embodiment of a display of the current invention;
- [17] Figure 7 is an embodiment of a display of the current invention;

- [18] Figure 8 is an embodiment of a display of the current invention;
- [19] Figure 9 is an embodiment of a display of the current invention;
- [20] Figure 10 is an embodiment of a display of the current invention;
- [21] Figure 11 is an embodiment of a display of the current invention;
- [22] Figure 12 is an embodiment of a display of the current invention;
- [23] Figure 13 is an embodiment of a display of the current invention;
- [24] Figure 14 is an embodiment of a display of the current invention;
- [25] Figure 15 is an embodiment of a display of the current invention;
- [26] Figure 16 is a block diagram of the present invention;
- [27] Figure 17 is an embodiment of a display of the current invention;
- [28] Figure 18 is an embodiment of a display of the current invention;
- [29] Figure 19 is an embodiment of a display of the current invention;
- [30] Figure 20 is an embodiment of a display of the current invention;
- [31] Figure 21 is an embodiment of a display of the current invention;
- [32] Figure 22 is an embodiment of a display of the current invention;

- [33] Figure 23 is an embodiment of a display of the current invention;
- [34] Figure 24 is an embodiment of a display of the current invention;
- [35] Figure 25 is an embodiment of a display of the current invention;
- [36] Figure 26 is an embodiment of a display of the current invention;
- [37] Figure 27 is an embodiment of a display of the current invention;
- [38] Figure 28 is an embodiment of a display of the current invention;
- [39] Figure 29 is an embodiment of a display of the current invention;
- [40] Figure 30 is an embodiment of a display of the current invention;
- [41] Figure 31 is an embodiment of a display of the current invention;
- [42] Figure 32 is an embodiment of a display of the current invention;
- [43] Figure 33 is an embodiment of a display of the current invention;
- [44] Figure 34 is an embodiment of a display of the current invention;
- [45] Figure 35 is an embodiment of a display of the current invention;
- [46] Figure 36 is an embodiment of a display of the current invention;
- [47] Figure 37 is an embodiment of a display of the current invention;



- [48] Figure 38 is an embodiment of a display of the current invention;
- [49] Figure 39 is an embodiment of a display of the current invention;
- [50] Figure 40 is an embodiment of a display of the current invention;
- [51] Figure 41 is an embodiment of a display of the current invention;
- [52] Figure 42 is an embodiment of a display of the current invention;
- [53] Figure 43 is an embodiment of a display of the current invention;
- [54] Figure 44 is an embodiment of a display of the current invention;
- [55] Figure 45 is an embodiment of a display of the current invention;
- [56] Figure 46 is an embodiment of a display of the current invention;
- [57] Figure 47 is an embodiment of a display of the current invention;
- [58] Figure 48 is an embodiment of a display of the current invention;
- [59] Figure 49 is an embodiment of a display of the current invention;
- [60] Figure 50 is an embodiment of a display of the current invention;
- [61] Figure 51 is an embodiment of a display of the current invention;
- [62] Figure 52 is an embodiment of a display of the current invention;

- [63] Figure 53 is an embodiment of a display of the current invention;
- [64] Figure 54 is an embodiment of a display of the current invention;
- [65] Figure 55 is an embodiment of a display of the current invention;
- [66] Figure 56 is an embodiment of a display of the current invention;
- [67] Figure 57 is an embodiment of a display of the current invention;
- [68] Figure 58 is a block diagram of a portion of the current invention;
- [69] Figure 59 is a block diagram of the present invention;
- [70] Figure 60 is a block diagram of the present invention;
- [71] Figure 61 is a block diagram of the present invention;
- [72] Figure 62 is a block diagram of the present invention;
- [73] Figure 63 is a block diagram of the present invention;
- [74] Figure 64 is a block diagram of the present invention;
- [75] Figure 65 is a block diagram of the present invention;
- [76] Figure 66 is a block diagram of the present invention;
- [77] Figure 67 is a block diagram of the present invention;

- [78] Figure 68 is a block diagram of the present invention;
- [79] Figure 69 is a block diagram of the present invention;
- [80] Figure 70 is a block diagram of the present invention;
- [81] Figure 71 is a block diagram of the present invention;
- [82] Figure 72 is a block diagram of the present invention;
- [83] Figure 73 is a block diagram of the present invention;
- [84] Figure 74 is a block diagram of the present invention;
- [85] Figure 75 is a block diagram of the present invention;
- [86] Figure 76 is a block diagram of the present invention;
- [87] Figure 77 is a block diagram of the present invention;
- [88] Figure 78 is a block diagram of the present invention;
- [89] Figure 79 is a block diagram of the present invention;
- [90] Figure 80 is a block diagram of the present invention;
- [91] Figure 81 is a block diagram of the present invention;
- [92] Figure 82 is a block diagram of the present invention;

[93] Figure 83 is a block diagram of the present invention;

## **DETAILED DESCRIPTION OF THE INVENTION**

[94] It is to be understood that the figures and descriptions of the present invention have been simplified to illustrate elements that are relevant for a clear understanding of the present invention, while eliminating, for purposes of clarity, many other elements found in a typical system and method. Those of ordinary skill in the art will recognize that other elements are desirable and/or required in order to implement the present invention. However, because such elements are well known in the art, and because they do not facilitate a better understanding of the present invention, a discussion of such elements is not provided herein. The disclosure hereinbelow is directed to all such variations and modifications to planning technologies known, and as will be apparent, to those skilled in the art.

[95] The present invention may include a plurality of tools, which may be organized, for example, in accordance with business rules, and which may include a planner, an organizer, an advocate

and polling builder, an attendance tracker, a progress tracker, and/or a financial tracker, and which may include at least one of these tools within a communication tool for events and projects, such as corporate meetings, presentations, discussion groups, product development meetings, or any assemblage of people at a place for a common purpose. The present invention may allow designated users to plan and organize an event or project, such as a meeting, on-line over a network, such as the internet, such as by communicating with a remote planning system and/or advocate builder. The present invention may utilize the communication provided by the network, in conjunction with an organized hierarchy of at least one database, in order to allow the organizers of an event to centralize activities necessary to execute a successful meeting or project, for example, into a paperless planning system, thereby improving output and operational efficiency of personnel, such as planning staff, and thereby reducing planning time and costs.

[96]                   The present invention may enable users to access at least one database to generate, for example, multiple events for different products or projects within an enterprise, such as a client, to invite guests and speakers to at least one of the events, to establish a venue and the support services required at the venue, to track the

cost and status of an event, and to permit message-level communication between pre-selected parties having system access. The present invention may be utilized by multiple organizations, wherein each organization may have multiple products or other motivations for multiple events. The users of the system may include, for example, system administrators, meeting planners, meeting attendees, speakers, service suppliers, or other individuals or entities that can contribute to the successful planning and execution of an event.

[97]                   The present invention may provide an interface for turnkey meeting planning services and real-time meeting information, such as by utilizing a web-based interface. The present invention may thereby provide an interface with summary tables and hyperlinked meetings regarding the meeting information and planning services. After selecting a meeting, and by utilizing a summary status option of a meeting, a user may click on a hyperlink for that summary status to that meeting and the web based interface may load information regarding the meeting selected, for example.

[98]                   A planning system in accordance with the present invention is shown in Figure 1. The planning system may be utilized, for example, for multiple meetings, multiple projects having multiple

meetings therefor, and for multiple organizations. Users may plan, track, and/or organize information related to at least one meeting for at least one client. Clients may interact with the planning system to request planning services and acquire information related to a meeting or series of meetings, for example. Clients may additionally execute and track a meeting using the planning system. The planning system may include project set-up and/or management 102, meeting planning and/or event logistics 104, and at least one database, such as a person and/or place database 106, for example. The planning system may also include a fulfillment request form management function 108 and a reporting function 110, for example. The planning system may be, or may include, for example, a Microsoft Windows distributed internet applications architecture, as discussed further hereinbelow.

[99]                   The project set-up and/or management 102 may include representative list management, speaker list management, task list management and security and access control functions 102 a – d. The meeting, planning and/or event logistics 104 may include recruiting and attendance venue selection, speaker selection, representative selection and event and travel logistics 104 a – e. The database may include an address book, schedules, profiles and

note logs 106 a – d. These functions may be supported by fulfillment request, letter and/or format management 108, or reporting 110.

[100]                   The planning system of Figure 1 may include this multiplicity of integrated components and at least one logical and/or relational database. A project in the planning system may necessitate or include one or more of the function or modules of Figure 1, depending on the requirements of the client. A project is a logical group of at least one logically related meeting. The project set-up module allows a project administrator to customize a project set-up. A project may track meetings, for example, such as meetings related to a given product of the client. A project may also include speakers, venues, client representatives, or recruitment and attendance data, of the at least one meeting, for example. Thus, for each component of the project, there may be a set of data attributes that may be tracked. Some of the data attributes for each component may be required, and others may be used at the administrator's discretion.

[101]                   The planning system may utilize, for example, dynamic link libraries (DLL) that link the project definition data, such as the project administrator's choice of component and fields, and HTML, XML, or ASPX templates, for example. These DLLs may



process the HTML templates before presentation to a user of the interface, replacing tags and information in the HTML template with the defining attributes captured. Thereby, the project administrator may have control of the layout and presentation of the data, and the planning system may thus ensure that capture validation and storage of data is consistent across all projects.

[102]                      The meeting planner and/or event logistics 104 may include venue selection, speaker selection, representative assignment of a meeting, audio/visual (A/V) supplier selection, and recruiting and attendance, for example. Fields tracked at the meeting level, and entered to, or accessed from, the person/place database, may include meeting date and time, program type, program status, meeting number and client meeting number, for example. Further, one or more speakers may be linked to a meeting. One or more venues may be linked to each meeting, and each venue may be considered a temporary selection until confirmed. Data attributes may thus include person/place attributes, as well as a confirmation flag.

[103]                      Attendees, recruits, or “targets”, may additionally be associated with a meeting. A target tracker may provide an interface to maintain a list of recruits, may import target information provided

by a client, may track status and contact history of the targets, may record and track contract information with a target, may record attendance data, and may be within, or associated with, the logistics

104. For each person in the target list, a flag may indicate if the person was invited, and in what capacity, such as attendee, speaker, moderator, representative, client, guest, or the like, whether the invitee has responded, the type of attendee, the number of guests, and/or the type of recruiting that was used to generate the list. Examples of the type of recruiting may include fax, telephone, representative invitation, guest invitation, and the like.

**[104]**                      The reporting may report real time status of sponsored activities in, for example, a tabular format including event schedules, venue information, speaker information, attendance rosters, program tracking and status, and financial information. Reporting may be a real time, internet-based format for secure access from any computer having access to the network, such as the internet or an intranet, on which the planning system is resident. Users may, for example, export and download a report in Microsoft Excel format to a local machine from the reporting module. Pre-defined reports may be available for any selected period. Pre-defined reports may include, for example, multi-day reports, such as a two day report, a

seven day report, or a weekly roster report. Other pre-defined reports may include, for example, an invitation report, a summary status report, a results report, an attendance roster, and/or a cumulative attendance report.

[105]                   A two day report, for example, provides status information, and shows events that will occur two days from the current business date, and may include, for example, the session or meeting code, the date and/or the time of the meeting, the location of the meeting, the host or moderator, current reservations and/or actual attendance, such as for a selected period of two days. A seven day report may thus include the same status information, but for a seven day period from the present date. A weekly roster report may also include the same information but over a week's period, and for a full roster of meetings on a single project.

[106]                   For example, a user may run a "2-Day Report" everyday in order to list all of the meetings occurring within the next two days. For all meetings listed, the user may print out a Venue Confirmation/Guarantee fax and Speaker Presentation Reminder, if applicable. An audio/visual company may be reminded based on this report, if needed, and final headcount may be listed on this report, for example. Confirmation faxes sent to all of the attendees,

speakers, and support personnel may thus be manually or automatically sent in accordance with the report, and may ensure that all meeting parties are apprised of critical meeting parameters.

[107]                   A user may run a Weekly Roster Report on a specific day, such as, for example, on each Friday. This report may show which programs may be occurring over the next 30 days. The user may generate a weekly roster report by going to the “Reports” section on a toolbar, for example, by choosing a “weekly roster report”, and by entering a date.

[108]                   An invitation report may include, for example, the session or meeting code, the meeting time and date and location, the host name, the date invitations were mailed, the number of invitations mailed, the number of acceptances and/or the roster returned. A status summary report may include, among other things, the session code, the date, time and location of the meeting, the host, the moderator, current reservations, actual data of attendance and the current status of all of the fields. A results report may include the rosters returned, the number of invitations mailed, the total RSVPs, the total attendance, the average attendance, as well as the session code, the date of the meeting, and the invitations returned. A hyperlink within a report may include, or provide a link

to, an attendance roster which might also include the session code, the date and time of the meeting, the location, the host, contact information for the host, contact information for the moderator as well as the speaker, the participants and the addresses thereof, as well as actual attendance at the meeting. The cumulative attendance report may report over a variety of events, and may include a brand name or project name, an event ID, meeting code, date and time, names of the host and moderator and the speaker, names of the attendees and the attendees' addresses, specialties of the attendees, as well as other information relevant to a cumulative report.

[109]                      The fulfillment request/letter and/or form management function 108 may include a form letter management module. This module may enable a user to combine ad-hoc queries with custom Microsoft Word document templates to produce form letters, for example. Once an ad-hoc query is designed and saved in the reporting module, it may be used as a data source for a form letter. The planning system may generate a text tag for each field in the data source to be placed in the form letter. Users may then lay out the word document and place the field tags in the correct locations. Once the template is defined, the data source may be applied to the

Word template. The end results may be the presentation of the form letters to the user in Word, preferably wherein the user may make modifications to the letters before the letters are printed. Once the ad-hoc query and a template has been defined, the two may be saved together as a form letter package, for example.

[110]                      The planning system also may include a finance module. This module may include tracked and/or estimated expenses. This module may track expenses at, for example, a meeting level. For each expense record, the type of expense, the status of the expense, i.e. whether it is an estimate, whether it has been paid, whether it is pending review, etc., the estimated amount of the expense, the actual amount of the expense, any comments regarding the expense, and/or relevant check numbers and check dates, may be tracked.

[111]                      Security access control 102 d may authenticate a user. Users of the system may log into the system via a network portal and access the system through the protections of a user name and password, for example. In addition, the security module may provide access control once the user has been authenticated. Multiple levels of access control may be defined. For example, one level may be for system controllers and another may be for a client

user. System controllers may have full access to the application to add, delete and update the data, and client users may have limited access.

[112]                   An auditing function may additionally be provided. The planning system may track creations, reads, updates, additions, edits and deletions from the databases, in order to provide a history of changes for auditing. The audit log may grow very large, and thus may require periodic purging. The audit log may track systems usage and help to resolve issues regarding data quality. Each audit record may be corresponded to a field in the person or place database or in the data captured, and may include a user ID and the date and time of any modification made, along with the new value for the field.

[113]                   In particular, the present invention may provide a web-based meeting setup interface, as shown in Figure 2. Upon selecting a button as in Figure 2, such as Programs, Speakers, Topics, Reports, Profile, Documents, or Help, for example, the browser may be directed to one of the many interfaces described hereinbelow. Meeting information may be presented in categories, such as on a left menu or a top menu as shown in Figure 2. According to an aspect of the present invention, a wizard with

reference links may be provided, such as on the left portion of the display. Such a links system may provide a user with the ability to quickly link to other portions and pages of the system for ease of navigation. As may be seen in Figure 3, the left menu may provide access to program details, budget information, expense details, attendance roster, print invitations and evaluate, for example. A screen for budget information is displayed in Figure 3, expense details displayed in Figure 4, attendance displayed in Figure 5, invitations displayed in Figure 6, and evaluations in Figure 7, for example. Additionally searching may be performed using the interface depicted in Figure 8, for example. Such searching may be based on name, venue, meeting code, status, or speaker, by way of non-limiting example only.

[114]                      Upon selecting Programs, for example, the interface may be directed to the My Programs page seen in Figure 9. In Figure 9 there is shown a screen shot displaying information regarding program status. Information such as Pending Request, Request Submitted for Approval, Request Approved, Request Denied, In Progress, Set-up Complete, Completed, Reconciled, Postponed, Cancelled and Programs Requiring Evaluation may be displayed. A count associated with each category may also be



provided. Such a count itemizes the number of programs with the associated status. Upon clicking on the Pending Request hyperlink, the pending request screen of Figure 10 may be displayed. This screen may include programs of the particular status in the territory of the user, or the user entered territory, to be displayed. If the Request Submitted for Approval hyperlink is instead selected, the screen shot of Figure 11 may be displayed. Similarly, the hyperlink for Request Approved may be selected, which may direct to the screen shot of Figure 12.

[115] For example, as may be seen in Figure 13, a click of Request Denied may show a table of requested meetings and the associated information for any meeting with an attendance denied by a supervisor when an approval was requested, such as by an alert request. Similarly, in Figure 14, meetings in progress may be displayed. In Figures 15 and 16 there is shown a set-up complete and completed screen shot, respectively. Meetings and meeting attendance may also be reconciled, as may be seen in Figure 17. In Figures 18 and 19, there are shown hyperlinks of postponed and cancelled meetings. Additionally, programs may require evaluation, as may be seen in Figure 20. Programs may also be requested, as may be seen in Figures 21A and 21B.

[116]                   The present invention may further provide a system wherein a user may create a program in the database. According to an aspect of the present invention, a meeting may be scheduled and all services included with the meeting may be requested during scheduling. For example, an audience may be selected and payment may be made, as well as other services known to those possessing an ordinary skill in the pertinent arts. Similarly, this service scheduling may be expanded to client level, such that a series of meetings may be scheduled by a client, such as a hospital or doctor, for example, and services may be consolidated as discussed hereinabove with respect to a single meeting planning.

[117]                   In scheduling a meeting, the client may prioritize the specifics of a given meeting such that weight may be allotted to various preferences. In this way, a client may be able to select a preferred date, speaker, venue speakers, dollars spent, room specifics, and other specifics known to those possessing an ordinary skill in the pertinent arts, for example, and the system of the present invention may weight each choice such as to accommodate as many preferences as possible while still meeting the client's meeting requirement and preferences. For example, the client may wish to have the best audio visual equipment for a given cost, such as \$500.

Venue information may be included in the database, and may contain information such as the shape of the room such as, u-shaped, for example, and an ability to provide or setup a registration table, which factors of the meeting location may affect available or acceptable options related to the meeting, such as particular types of A/V, or time frame for registration, for example. Additionally, the present invention may provide a level of approval after a meeting is created, whereby a manager or designated individual may be alerted to return to the database and accept or reject a meeting. This approval level may provide an additional level to check available or acceptable meeting options, for example. Such an approval may occur as described hereinbelow with respect to alerts.

[118] Figure 22 represents an exemplary database, which may be, or be within, for example, a person and/or place table. The person and place table may provide a common store for any representative, speaker, moderator, attendee, audio/visual equipment or provider, and/or venue data, for example. Providing references to people and places in a single table may provide a consistent, normalized view of the data, and may provide a common access point for critical stores of information. Each person and/or place may be stored in the person and place table/database, thereby

providing a common value for all sub-systems. This common-valuing may allow analysis of speaker and attendance data across clients, brands and/or projects.

[119]                   The person and place database may include the contact information, i.e. the addresses and phone numbers, of all people in and involved in a project or projects. The person and place database may abstract this contact information to provide a consistent interface for accessing the information. For example, an address for a speaker, and an address for a venue, may be stored in the predetermined table having a given structure for the particular project or meeting. This predetermined table, or given structure, may vary by client, or by project, or by meeting, for example. Each address for a person or place may be labeled with a type, such as business, home, shipping, etc. For each address, the person and place database may store street, city, name, zip code and comment data. One address for each person or place may be flagged as a correspondence or mailing or shipping address, such as for any automated form letters that may be produced as discussed hereinabove. Thus, the form letter module and the databases(s) may preferably be communicatively linked for automatic address generation for form letters, for example. Phone numbers may also

be labeled by type, i.e. business, home, mobile etc., such as for automated phone dialing upon linkage to a phone system. Each phone record may contain a phone number, extension, comments, and a type, for example. The person and place note facility may provide an interface to enter free form text notes, that will be date and time stamped and linked to a person or a place. These notes may then be freely available, or available in accordance with a given security clearance, elsewhere in the planning system. These notes may be, or be used by, non-structured data that does not have a pre-specified field in the person and place database, or may be structured data for relational storage in a database, for example.

[120] In operation, a user may log-in, and that log-in may alert the planning system as to the functions, projects, or meetings, to which that user may be granted access, and, if access is granted, to what level access may be exerted. Once connected and authenticated, the planning system may offer the user a menu of available choices. Figure 23 is an embodiment of the menu options. An application may be selected 302 using a selector 303, such as a drop-down menu, for example. If a meeting planner is selected 302 as the application, the user may enter a client name 304, a brand name 306, and/or a project name 308. Once these parameters are

entered, a continue button 310 may be depressed and a new screen as shown in Figure 24 may appear.

[121]                      Figure 24 is an embodiment of a screen after login. The screen may be used to navigate, such as via navigation buttons on the top of the displayed window 402, such as a tool bar. If a new meeting is to be added, the Add Meeting button 404 may be depressed, for example.

[122]                      Requests for the addition of meetings may occur through a network or web-based system, and may be completed by a system user, or an account supervisor, for example. Alternate methods of adding meetings may also be utilized. In an embodiment of the present invention, a meeting may be added using the screenshot of Figure 25. In particular, a meeting type and topic may be chosen. Budgets may be assigned, as well as representatives designated, as may be seen in Figure 26. The numbers of attendees, audience, and targeted medical professionals, for example, may be entered as shown in Figure 27. In addition, driving factors may be designated, such as speaker, date or location. Such driving factors may be tiered into primary, secondary, or tertiary, for example. Such driving factors may be seen in Figure 28.

[123] Speaker information may be designated, as in Figure 29, as well as dates and times in Figure 30, and venue and contact information in Figure 31. The meeting designer may also configure additional venues utilizing the screen shown in Figure 32, and audio/visual requirements utilizing the screen shown in Figure 33, for example. The present invention may display, as shown in Figure 34, program cost and general notes related to the meeting, which notes may be added using the screen of Figure 35. After configuring the meeting, a “summary/submit” display may be provided as in Figure 36. While meetings await appropriate approval, these meetings may be accessed using the screen shot shown in Figure 49. If a meeting meets appropriate approval, the approver may access the program details using the screen depicted in Figure 50. The approver may thereby review the entered meeting and approve/reject the meeting.

[124] Alternatively, the user or account supervisor may be asked to enter a meeting code 406. Meeting codes may be determined by the account supervisor, and may contain a client's sales territory or district number, or may be automatically generated by the planning system upon generation of a meeting, for example. Meeting codes may be entered by typing directly into the meeting code box 406, or by a drop down selection from the code box 406,

for example. Pull-down 408 may allow the user to select a status for the meeting. If the user does not assign a status, the status may self assign, such as “No Request”. A meeting may be considered “Set-Up In Progress”, for example, until all meeting details have been completed. Once the program is confirmed and all details have been arranged, the program may have status “Set-up Complete”.

[125] In order to complete meeting setup, a plurality of meeting information, such as meeting date and meeting time, may be entered. For example, to set up a meeting date, a calendar icon 410 may be used. The user may click on the calendar and then click on the date that has been selected. A meeting time may be assigned 412, such as along with a corresponding pull-down to select A.M. or P.M. After entering the above information, the user may save the screen using button 414, thereby allowing the user to move to the next screen, whereat the user may continue entering information about the meeting.

[126] Figure 37 is an exemplary embodiment of editing of meeting parameters. At any time after a meeting is entered, an authorized user may edit the information that was previously entered, such as by entering the “edit meeting” mode via the toolbar button 502, for example. In addition, the user may use an edit meeting to



add any information that was previously unavailable. The user may be encouraged to save any changes that were made. Certain of, or all, fields depicted in Figure 24 may be edited, or selectable via drop down windows, for example.

[127] Exemplary data fields to be entered in Figure 37 may include the Date 7-Day Packet Sent 550 field, and/or the 7-Day Packet Tracking Number field 552, wherein a corresponding FedEx tracking number may be entered. Also selected, such as by using the calendar icon, may be the Date Invitation Mailed 554 and the Date Attendance Roster Returned 556 fields, for example. In certain exemplary embodiments, the user may type freely in the corresponding space for meeting notes 556, and via notes, or via a dedicated meeting email server listing, for example, the user may thereby communicate with other individuals interested in the meeting. For example, a message left in the meeting notes area may be read by other individuals with access to the meeting planner. A Feedback Report Returned status 560 may be automatically assigned as “no”, unless an entrant uses the pull-down and selects “yes”, for example. A Speaker Status 610 may be entered via a pull-down throughout the meeting planning process to assign a speaker status. If the meeting date has not been confirmed with the speaker,

the speaker may be “pending”. If the date has been confirmed, the speaker status may be “confirmed”. Speaker Travel 612 may be recorded via, for example, a pull-down to assign personnel to handle the speaker’s travel arrangements. A speaker may be confirmed 614 by using a pull-down for the appropriate method of confirmation, such as a phone conversation, fax, e-mail, etc. A date that the speaker was confirmed 616 may be entered via the calendar icon, for example. Speaker Notes may be typed freely in the corresponding space for speaker notes 618, for example.

[128]                      A contract status field may be automatically populated, such as with “Initial Request”. When the user changes the status to “Contracted”, the screen may change to show more venue details. A venue may be considered contracted when a received and/or signed meeting confirmation from the venue is obtained, and a date contract returned field may be populated on the date of receipt of a received and/or signed contract from the venue.

[129]                      Returning now to Figure 37, the Meeting Type 504 may be selected from the pull-down options and may identify the business type of the meeting. The meeting format 506 may be selected from the pull-down options and may indicate the format of the meeting, such as a dinner, breakfast, or lunch meal type, a

conference, seminar, or other meeting type. Meeting topic 508 may be selected from the pull-down options and may be related to one of the products, or areas of research, or any other activity that a business entity may engage. Note that a meeting type, format and topic selections may be pre-defined by an account supervisor at the start of a project.

[130]                    A Date Request Received 510 may be entered, such as using the calendar icon, to record the date that the meeting request was received, such as in order to assist the user in determining the amount of time it has taken to complete the meeting set-up. A host may be added in the add new host field 512. To add a host, the user may click on the Add New icon, and/or may search an underlying host database to find a host, or may add a host to the database so as to allow for selection of that host from the database. Of additional note, a user may perform a realistic search, which may automatically reject nonsensical searches, and which may include wildcards, for any field in use in the present invention. If no results are found for the search, the user may add, and then select, the desired search person, place, or entity. Thereby, the present invention provides a universal, one touch (or click), search function, followed by a one-touch change, add, or select function. If a name is

already entered and the user wants to change it, the user may first delete the entered name by clicking on the X next to the appropriate field, for example. The Host Voicemail 514 may automatically populate the host's voicemail extension when that information is added into the host profile, for example. The target list included 522 may utilize the pull-down to select "yes" if the meeting host has included a target list with his/her meeting request. If this information is not updated, the system may automatically assign as "no".

[131]                   The Adding Additional Point Person, which is, in one embodiment, a coworker of the client named as the "point person", may serve as an additional point of contact. The additional point person may serve as a default cc: to assist the point person. The Additional Point person may be added to the meeting in the same fashion as set forth hereinabove. The contact 518 may be an employee or contractor of the host, responsible for confirming the meeting logistics. Contacts may be added to the meeting in the same fashion as the host. Of note, all persons may be added to a meeting using the single touch search, and the single touch add, select, or change, as discussed hereinabove. A moderator 520 may be, for example, a speaker that is employed by the customer. Within the moderator field box, the user may have the option to select or

delete the current moderator. The moderator may be added to the meeting in the same fashion as the host. The territory number 524 may utilize a pull-down to select the appropriate number, which may have been preloaded by a system administrator. The contract location description field 526 may utilize the pull-down to select the appropriate description.

[132] As discussed hereinabove, Figure 38 is an exemplary embodiment of the present invention. The speaker field 602 may contain the name of the speaker for a program. The speaker may be, for example, a visiting faculty member, or other client employee or contractor, that has been trained by a client to speak on behalf of the client. The speaker may be added to the meeting in a similar manner to the host. The business unit field 604 may utilize a pull-down menu selection. The geography field 606 may utilize a pull-down to assign the correct location of the business unit involved. The venue field, such as that at which the speaker will speak, may be the location in which a meeting will take place, such as a restaurant, hospital, hotel, etc. Once a reservation has been made, the venue may be marked "reserved" in the system.

[133] A target list may be included with a meeting request, and each target may be entered in the "Participant" section of the

meeting planner. For example, if the meeting was a conference of medical specialists, a target list may be a list of medical personnel that a meeting host might like invited to the program. To enter a target list, the user may select a meeting to affiliate with the target list. At the top of the meeting select screen, for example, the user may go to the participant section. To add a New Participant the user may click on an “Add New Participant” button located, for example, in the top right hand corner. An icon may be used to indicate the function, such as, for example, a red plus symbol. Depressing the icon may open a search screen, and the user may search for a target in the same fashion that a search for a host or speaker is performed. If the search is successful, the name and address may be added to the invitation list by depressing an “Add Participant” button. If the user’s search is unsuccessful, the user may depress the “Add New” button and create a new profile for that target.

[134] As a user is entering the target list, the system may prompt the user when a pre-determined participant limit is reached. In the case of entering a target list, a user may override the limit and continue entering names. Thus, a particular meeting may have a select number of participants (“Yes” responses) allowed to attend a program, and this limit may be shown at the top of the Participant

Screen. There may also be notes in the Participant Notes section indicating a deviation from the limit listed at the top of the screen. Notes about participant limits may override a pre-determined participant limit. Participants may also be deleted. To remove a Participant, a user may click on a delete icon, such as, for example, an “X”, and may thereby request the deletion function. The user may then be queried concerning the desire to actually delete.

[135]                   A target list may, for example, be imported into a meeting. To import a list from an existing planner target group, such as a target list for a given district, territory, group name, or group attribute, the user may go to the meeting’s participant screen. The user may then click the territory import, contract location import, or import group to begin import. The system may ask the user to confirm that the user wants to complete this import for this meeting to insure that the user has the desired meeting and group selected. If correct, the user may select “Submit”. The planning system may then import all names affiliated with that territory/contract/group. For example, attendee lists may be downloaded in a comma separated value (csv) format. A downloaded attendee address list in a csv format file may then be found, for example, in the fulfillment module, as discussed further hereinbelow, such as in csv lists 706, 708. The

file may be additionally be downloaded into an Excel csv file by choosing a file name from a menu that appears as "Save Target As".

[136]                   If a meeting host wants to only invite specific people from the list previously imported, the user may choose the "mass select" function, for example. Mass Select may default to all names being a "do not invite". The user may then select those targets that the host does want to invite. Once the user selects and saves the names desired, and the names left as "no" may be removed from the list, thereby leaving only those names that selected as yes.

[137]                   The present invention may allow for the inviting of guests to a meeting by assembling and entering responses to invitations (RSVPs). Invitations may provide the invitee with a fax back, or email back, request, ("fax back" response) for example. Once the invitee responds, the fax back or email back is considered a response or RSVP. Invitees may note on a fax whether or not they will be attending a program, and may provide some profile information with the RSVP, such as an address, phone, fax, Social Security number, or TaxID, for example.

[138]                   If a fax back response is positive, the user may ensure that the information on the fax back form is reflected in the invitee's profile, i.e. medical suffix, address, phone, fax, SS# or TaxID. The



user may then save the response by clicking on the “Edit” icon near the participant’s name. The user may use a drop down box under attendance status to choose “Yes” to indicate the fax back RSVP was positive. If a guest count was requested on the fax back form, the user may enter the number indicated in the guest count field and send a fax or email confirmation, for example. A confirmation fax may be sent by the user by first selecting to send an e-fax, editing a reply, and delivering the e-fax via electronic mail, for example. Once the e-fax is successful, the user may initial and date the RSVP and file it in an appropriate folder, for example. Optionally, the user may send a mail confirmation, which may be performed by printing the edited fax message, and printing the letter on letterhead for hand mailing.

[139]                      If the fax back RSVP is negative, the user may ensure that the information on the fax back form is reflected in the invitee’s profile, i.e., medical suffix, address, phone, fax, SS# or TaxID. The user may save the response by clicking on the “Edit” icon near the participant’s name to provide editable fields. The user may then utilize the drop down box under attendance status and choose “No” to indicate a negative response. The user may then file the negative RSVP in an appropriate folder.

[140]                   The user may be able to add, edit or search a profile to add to a list. When a user clicks on “Add New” button in meeting list, for example, a search box may appear. A user may use a wild card search when the user is uncertain of an exact spelling of an attendees or speaker’s name, for example. The asterisk may represent the wild card and can be used as a prefix, suffix or both. For example, using the wild card as a suffix for Jon\*, will result in a search for any combination of letters using “Jon” as the first 3 letters of the field searched. Jon, Jonah or Jonathan would all be exemplary possible outcomes for this wild card search. If the user knows the city or state for the person/place entry, the user may enter that information as well. Providing additional information may help reduce excess results to thereby produce a more efficient search.

[141]                   If a search is successful, a listing may appear as a set of matches to a search. To make a selection, the corresponding “Edit and Add to Meeting” tab may be selected. A profile of the individual may appear upon selection to allow the user to verify that that the individual and all of the relevant information is accurate. At any point in the process the user may use the “back” button at the top of the page to bring the user back to the search screen to, for example, create another search selection.

[142]                    If the record that the user is seeking does not appear in the search results, a user may utilize the “Add New” button. When the user selects add new, a blank profile screen may appear. The user may enter all appropriate information, such as name, address, phone, fax, and the like, and may save. The user may then select the “add to meeting” button by using the icon at the top of the profile screen, for example.

[143]                    The present invention may be utilized to print invitations to a meeting attendee. Generally, printed invitations may be sent, for example, about 4 weeks before a program date. The invitations may be generated from the “Fulfillment” module in the planning system. Figure 39 embraces one embodiment of the invention showing a the fulfillment tool bar button 702. A user may print and send such an invitation by choosing the meeting desired, such as by selecting the correct meeting code from the drop down list provided in the fulfillment section. For example, a custom invitation may be sent by selecting the appropriate drop down menu selection 704. Invitations may then be printed on designated letterhead.

[144]                    Reminder, or other, faxes may be sent through the use of the present invention, in accordance with a manual trigger, or

an automatic trigger. An automatic trigger may be, for example, time triggered or event triggered. A time trigger may be automatically generated on a certain date, or at a certain time. An event trigger may be an event, such as a change in meeting time, completion of a setup, etc. These triggers may be automatically entered to the system, and the system then tracks until the event occurs, and, upon occurrence of the event, the faxes (including emails or telephone calls) are automatically generated. Events, or time, triggers may trigger faxes only to persons having a certain status for a given meeting in the database. For example, the event "setup complete" may trigger an event fax to the meeting host. Alternatively, for example, on a specific day, such as, for example, a Monday, an account coordinator, or an automated message generator operating on a triggered basis, may send reminders, cancellations, postponements, attendance rosters, confirmations, invitations, or other document templates that are populated by merging information from a database for manual or automated distribution, by fax, email, automated telephone call, or the like, to participants, speakers, host, additional point persons, speakers, audio/visual suppliers, or the meeting attendees, for example, such as for the meetings coming up that week. If a meeting is occurring over the weekend or on a Monday or Tuesday, the present invention may send the reminder

faxes or emails Thursday or Friday, for example. In addition, reminder faxes can be e-faxed from the computer in the same fashion as confirmation faxes, for example. An automatically generated fax, email, or the like, may be autofilled from the information in the database, such as by an automated merge, such as by autofilling the fax number, name, position, and/or status (host, attendee, etc.) in accordance with a given event or time.

[145] As may be seen in Figure 40, alerts may be generated as events occur within the planner. Alerts may take the form of a notification or a prompt. For example, the system may send an email to a service requester when status elements of a meeting change, such as when a speaker is booked, or when a conference location is booked, for example. The system of the present invention may provide for a database of alerts, such that a record of the alerts sent and received may be reviewed and reported.

[146] The system of the present invention may keep records of alerts, as may be seen in Figure 40, and such records may be reviewable. Alerts may also be utilized to remind participants of a meeting to return, for example, a website to rate or evaluate a meeting. In this way, the system of the present invention may track performance of a meeting based on any of a myriad of information

within the system, such as speaker, meeting location and meeting topic, for example. According to an aspect of the present invention, the system may send an alert, in the form of an email, for example, to a representative inviting the representative to return after the meeting to evaluate the meeting, and may thereby accordingly track performance of meetings or speakers.

[147] In addition, the system of the present invention may display programs allocations, as may be seen in Figure 41. Different types of programs may be displayed, and the categorization of each may occur, such as allocated, in progress, completed, and still available, for example. Similarly, budget allocations may be tracked and presented as shown in Figure 42. Such presentation may provide a summary of allocated regions and totals for each, for example.

[148] Other program allocations may also be highlighted according to an aspect of the present invention. Such other programs may be displayed as shown in Figure 43. For example, a meeting program may be chosen and a topic selected. Other individuals may be added to the program, such as for cost sharing, such as a partner to share costs. Further, the present invention may provide a mechanism to target an audience specifically with one or

more programs, such as a family practice in a particular location. Programs may be found and selected by searching, such as for venue or zip code, for example. Speaker attendance at a meeting may also be tracked in accordance with one or more programs, such as speaker training, for example. Such a speaker training tracking may be displayed as shown in Figure 44, for example.

[149]                   The present invention may also provide for searching based on speaker. As may be seen in Figure 45, there is shown a screen shot of a speaker search according to an aspect of the present invention. Such a search may be based on the type of speaker, specialty or topic, or may be based on the name or location of the speaker, for example.

[150]                   According to an aspect of the present invention, consulting contracts may be attached and provide access, such as by using links or other method known to those possessing an ordinary skill in the pertinent arts. Such consulting contracts may, for example, include records of investigators, and/or research, speaker, or general consulting. Such agreements may be scanned in and attached to the record of the speaker, such as a doctor. According to an aspect of the present invention, this system of attaching contracts and speaker resumes may be accessed via an icon. Other

information, as may be realized by those possessing an ordinary skill in the pertinent arts, may also be incorporated into the present invention in a similar manner.

[151]                   The present invention may contain a database of approved speakers and venues. Other venues and speakers may be added to the database by nomination, for example. Further, a database of approved topics may be included in the system. Approved topics may be included, as illustrated in screen shot of Figure 46. Approved topics may approved by a system administrator.

[152]                   After a meeting has occurred, the user may wish to record return rosters to thereby provide a listing of each person who actually attended the meeting. Upon receipt of a return roster, the user may click "Edit" in the invitee's record in the Participant Screen, and click "Yes" in the actual attended section of the record, for example. The user may save that information and enter the roster return date on the meeting information screen.

[153]                   Expenses for a meeting may additionally be tracked through the use of the present invention. The user may perform this function by opening the project, clicking on the financial button, choosing "Expense Register", clicking "Add New Expense", selecting



the meeting code, and selecting the charge type (i.e., venue, outside AV...) or by entering the Expense Type (Visa), or the expense category (F&B, Room Deposit...), or by entering the charge amount, such as including a decimal (100.00), and/or by entering any notes pertinent to the charge. The user may save this information for permanent record keeping.

[154]                      Figure 47 is an embodiment of a screen after login. A tool may be chosen at 802. A client may be chosen in 804. An existing brand or product that is the subject matter of the meeting may be chosen in 806. An existing or new project for the meeting may be chosen in 808. In the example of Figure 47, a meeting planner was chosen, the client is Pfizer, the brand name is Glucotrol®, a product of Pfizer®, and the project is a dinner meeting entitled 2001 Dialog Dinner Meeting.

[155]                      Figure 48 is an embodiment resulting from depressing the edit meeting button 902. Figure 48 is a list of all meetings for the Glucotrol® 2001 Dialog Dinner Meetings. Various meeting codes 904 are displayed for the meetings displayed on the Figure 48 meeting list. Each meeting may have an individual code which specifically identifies it. The date and scheduled time for the meeting 906 may also be listed for each meeting code. The status of the

meeting may also be shown 908 as being either completed, canceled or in set-up, for example. The host of the meeting 910 is listed as an individual who is sponsoring the meeting. The moderator 914 is also listed for each meeting. A first, second and third speaker 916 may also be listed for each meeting. The meeting location 918 may be provided as a city or state, and venue 920 provides the specific business location for the meeting. The audiovisual 922 allows the company providing audiovisual services to be listed. The exemplary overall listing of Figure 48 may provide a user with a single page snapshot of all meetings for a given product. Each individual meeting code 904 of Figure 48 may represent a hyperlink to additional information for that meeting. For example, the hyperlink for meeting code GLX-F3F-3, 924 may bring the user to a display, such as that shown in Figure 51.

[156] Figure 51a is an embodiment showing details of the meeting designated by the meeting code GLX-F3F-3. The meeting code is shown 1002 in Figure 51a, as is the meeting status 1004 and the meeting type 1006. The meeting date is provided in a field 1008, and additional information indicating the format of the meeting 1010 is provided. In the example provided in Figure 51a, the meeting topic is indicated as a meeting discussing type 2 diabetes in 1012,

and the meeting time is indicated as 7:00 p.m. on 1014. The date the request for the meeting was received is also indicated in the display 1016, as is the host of the meeting 1018. Note that the host name is a hyperlink to a profile of that person. An organizer contact is provided in 1022, and additional point persons may be added, as well as a moderator 1026. Should a target list be included, its presence would be indicated by a flag in the field on the display 1028. The date that the seven day packet report was sent, as well as the date any invitations were mailed, are indicated in fields 1030, 1032 respectively. If the seven day package has a tracking number, it may be indicated on the display 1034. If edits to the attendant's roster were returned to the host, that may be indicated in field 1036, as well as any feed back report returned in field 1038. The host can also track the number of gift certificates requested in a field provided on the display 1040.

[157]                   The present invention may display meeting notes to those hosting, organizing and attending the meeting 1042, thereby allowing meeting planners to exchange ideas and information so that the best ideas and resources of the meeting planners are utilized. A territory number 1044 and a contract location description 1046 may be available as drop down menus and may be pre-determined by a

system administrator. Speaker information may be provided by utilizing an icon button for adding additional information 1048. A speaker's name may appear as a hyperlink 1050, if a speaker is listed. The hyperlink may provide a profile of the speaker so that additional information may be gained by those who have access to the system. The status of the speaker, such as confirmed or unconfirmed, may also be presented 1052, and the method of confirmation 1056 as well as the date of confirmation for the speaker 1058 may also be provided. To assure that the speaker has adequate transportation, speaker travel organizer 1054 may also be provided so that a speaker itinerary can be verified and included in the information offering to a host, organizer, speaker, or the like. Figure 51b continues the display shown in Figure 51a. The display shown on Figure 51b may include speaker notes that can be used to record communication with, or to contact or communicate ideas to, the speaker, such as wherein the speaker may have access to other members who are involved in meeting planning. Speaker notes 1060 may include contact or travel information, speaker topic information, financial information or qualifications relating to the speaker. The present invention may include browser-based review of notes, or attachments, for a meeting, or for a person related to a given meeting, such as attachments related to a speaker, such as a

curriculum vitae, or to an audio visual supplier, such as a copy of the available equipment. Thereby, browser based attachments may be associated with any person, entity, or place within a database, and may be available to all users accessing a meeting involving that person, entity, or place, or to an authorized group of users accessing that meeting.

[158] In an embodiment shown in Figure 51b, the business unit or geography, as well as budget categories, may be displayed 1062, 1064. Details may be displayed on the same, or an associated, page by, for example, using a scroll down control bar. A toolbar 1066 may be used to insert hyperlinks to jump back to the top of the page, to the travel portion, to the participant listing, to the financial summary, or to request changes, for example. The name of the venue 1068 may also be a hyperlink to provide a profile for a venue. The exemplary display of Figure 51b provides a venue address 1070, phone number 1072, fax number 1074 and a contact at the venue 1076. The meeting room may be displayed 1078, as may be the contract status 1080, such as whether the contract has been signed for this specific date, and/or the time that the room at the venue is accessible 1081. The date that the reservation was made 1082 and the total capacity of the venue 1084 may also be

displayed. The capacity of the venue may limit the total number of invitees to the meeting, and a venue may be recorded in a memory as being so limited. The date a venue has been supplied a credit card as a means of payment for the event may be provided as an in-date form in the display field 1086, for example. The cost per person 1088, the date of the contract for the venue 1090 and the venue cost 1092 may also be displayed. The date the contract was returned after being signed by the venue holder 1094, and a method of payment 1096, may also be indicated. The audiovisual supplier for, for example, audiovisual aids, may be provided in 1098. The audiovisual supplier's name may be a hyperlink to a profile for that supplier, and may be displayed 1001. The audiovisual contact name 1003 and the supplier's city and state 1005 and phone number 1007 and fax 1009 may be displayed. Venue notes which indicate relevant information may be placed in a text field provided in display 1011 of Figure 51b. Until a venue is contracted, alternate venues also available may be displayed in Figure 51c. If the meeting may occur in multiple locations, a second venue 1013 or a third venue 1015 may be provided in details with respect to those venues. Travel information may be added or edited, and entry of such may be accomplished via pushbutton 1017, for example.

[159]                      Returning to Figure 48, if the profile edit button 924 is depressed, the display of Figure 52 may be provided. Figure 52 is an embodiment of a profile search that allows a profile edit after a search of a person 1104, venue 1103, or AV supplier 1102. A search may prioritize search results in accordance with an affiliation to people or entities. If the user selects radio button 1104 to search for a person, the display of Figure 53 may be presented to the user. In the embodiment shown in Figure 53, the search for a person may be completed by typing in the last name of the individual 1202. It is noted that different versions of the same person may exist with respect to different clients within the database. Additional information may include first name 1204, city 1206, state 1208 and zip code 1210. Additional search options for locating a person during a search may include client project 1212, a person type, such as speaker, moderator, target, host, or any of the above 1214. The search may be initiated by depressing search button 1216, and a new search with clear fields may be acquired by depressing the clear all button 1218, for example. Also indicated in Figure 53 are search results from a person search indicating name, the person-type, the city, state, and zip code, in a search results line 1220. Should any of the information be incorrect or subject to change or updating, the profile may be edited by depressing the hyperlink 1222, for example.

If a new person record needs to be added to the database, the add new button 1224 may be used to add a new person to the profile database.

[160] It is an aspect of the current invention that meeting data may be organized for effective use without viewing multiple screens. The structured reports provided by the current invention provide significant utility to the meeting planning process by informing meeting planners of various and multiple aspects of the current project. These combined aspects of the planning activity may be assembled into standardized reports.

[161] Reports may be accessed using the toolbar shown in Figure 54. The reports button 1302 may display the report menu 1304 for the selected project. Selected reports may include multi-day reports, such as, for example, a two day report, five day report, seven day report, weekly roster report, invitation report, status summary report, AS report, result report, cumulative attendance report, cumulative target report, speaker report, speaker request and/or a financial report. The report types may be hyperlinks, and selecting any of the hyperlinks may bring up the report page. For example, selecting the two day report 1304a may bring up the page display in Figure 55.



[162]                    Figure 55 is an exemplary menu to access a two day report. The user may enter a report starting date 1402 and depress the continue button 1404. Alternately, the user may depress the calendar icon 1406 to bring up a calendar display, as shown in Figure 56. The calendar display of Figure 56 may allow the user to select a date to initiate a two day report. For example, if the user selects February 14 within the Figure 56 calendar, the display of Figure 57 may be provided.

[163]                    The system of the present invention may also generate a number of reports. As was discussed hereinabove, a myriad of variables may be thereby tracked. Thus, reports may be generated based on any of these variables. Several of the reports may be seen in the screen shot of Figure 58. Each type of report may be available via a hyperlink access from a relevant heading. Reports may be generated based on Program Costs, Program Summary, Budget Summary, Detailed Program Costs, Attendance Summary, Evaluation Summary, Contract List, Speaker Honoraria, Field Sales, Marketing Financial, and Login Summary, for example.

[164]                    Referring now to Figure 59, there is shown a screen shot according to an aspect of the present invention, showing a sample program costs report. As may be seen, the expenses are

identified with regard to a speaker, consultant or topic. Referring now to Figure 60, there is shown a program summary report identifying the CME, representative, grand rounds, promotional and CSC. Referring now to Figure 61, there is shown a budget summary report identifying budget, estimated costs, actual to date costs and remaining budget based on any grouping, including representative, territory or other, as may be realized by those possessing an ordinary skill in the pertinent arts. According to an aspect of the present invention, the remaining budget for a project or meeting may be estimated based on the interred budget and amount dispersed to date.

[165] Referring now to Figure 62, there is shown an attendance summary report according to an aspect of the present invention. As may be seen in Figure 62, the number of attendees, the territory and other information may be displayed in the report. Figure 63 shows a screen shot of the program evaluation summary report of Figure 58. As may be seen in Figure 63, various feedback may be collected regarding programs including speaker qualities, topic qualities, meeting and facility qualities, as well as other feedback associated with the event which may be collected, as may be apparent to those possessing an ordinary skill in the pertinent

arts. Further, Figure 64 shows a contract list report print screen. As may be seen in Figure 64, the information pertaining to a contract may be displayed, such as territory, type, initiation date, expiration date, status, and other information pertaining to the consultant. Other information may be included as would be apparent to those possessing an ordinary skill in the pertinent arts. A screen shot of a speaker honoraria report is shown in Figure 65. As may be seen in Figure 65, a speaker with the speaker's associated identifying information may be logged with the accumulated honoraria and speaking engagement information. Further reports may include a field sales report, a screen shot of which is shown in Figure 66. As may be seen in Figure 66, a tabulation of sales for a given field representative may be displayed and may be accumulated within a temporally appropriate designation, as desired.

[166]                      Market financial summaries may also be included according to an aspect of the present invention. For example, as may be seen in Figure 67, a market financial summary report may include type of event, topic information, pass through dollar for completed events, expenses for completed events and similar categories for pending events. Other information may be included, as may be evident to those possessing an ordinary skill in the

pertinent arts. A login summary report may also be included. As may be seen in Figure 68, there is shown a screen shot of a login summary report according to an aspect of the present invention. As may be seen in Figure 68, territory information, along with login name, last login date, and login count, may be tabulated. Other information may also be included as associated with a login identity, as may be apparent to those possessing an ordinary skill in the pertinent arts.

[167] Figure 57 displays a screenshot of a dialog dinner meeting two day report for a reporting period ending 2/14/02, and displays the basic information concerning a project identified by a session code, date, time, location, and host, and displays the number of current and actual reservations and attendance 1604. Figure 57 indicates the session code of the meeting, which may also be a hyperlink to allow a user to further investigate this particular meeting. The date and time 1604b, 1604c may be the date and time that the report for the indicated event was run.

[168] Returning to Figure 54, should the hyperlink for a seven day report 1304c be selected, the report shown in Figure 69 may be displayed to the user. The report indicates that two session codes may have available seven day reports 1704, 1702. Also

indicated are the date whereon the seven day packages were sent to those interested in receiving reports.

[169]                      Should the summary status report 1304f be selected, the hyperlink may provide the page shown in Figure 70. Figure 70 displays an embodiment of the current invention that may be used to provide a summary status report for a user. The status report may indicate the general status 1802, as well as a count 1804 for all individual meetings under a certain product project. As shown in the example of Figure 70, the list can be extensive, covering a total of 133 different meetings associated with business projects. The summary status report may indicate a session code 1806, date and time of the meeting 1808, the location of the project meeting 1810, the host and the host's extension 1812, 1814, as well as any additional host 1816. A moderator is shown in the table 1818, and a first, second and third speaker may be displayed 1820. The topic of the meeting may be shown in field 1822, as well as the current reservation, total number of current reservation 1824, and the actual attendance of a completed meeting 1826. The overall status of the meeting may be provided in 1818.

[170]                      Returning to Figure 54, the hyperlink 1304d, weekly roster report, is selected. A display similar to that of Figure 71 may

be displayed. Figure 71 displays a weekly roster report for all of the session code projects available under a particular product. A roster report may include the current reservations as well as the actual attendance at the various meetings associated with the project.

[171]                      Returning to Figure 54, the user may invoke an invitation report 1304e by selecting the associated hyperlink. As a result, a display as shown in Figure 72 may be presented to the user. Figure 52 represents an invitation report. The invitation report may include a project session code for each meeting 2002, the associated meeting time and date 2004, the location name of the meeting 2006, the host name 2008, the date the invitation was mailed 2010, the number of invitations actually mailed 2012, the number of acceptances from that invitation 2014, the actual attendance of the meeting 2016, if the meeting has already transpired, whether or not the roster has been returned and the date of return 2018, and the meeting status, such as either completed, set-up or canceled 2020. The invitation report of Figure 72 allows a comprehensive single page view of all of the meetings scheduled within a business product line, and allows the user to inspect the number and status of all invitations.

[172]                      Returning to Figure 54, if the user selects a results report 1304h hyperlink, the display in Figure 73 may be provided. Figure 73 is a results report that provides cumulative statistics on a particular program or series of meetings. The report is a results report 2102, and statistics for the multiple events or meetings are provided in the display in 2104. Provided in the body of the results report may be the individual projects session code 2106, the date of the meeting 2108, a host or additional point person 2110, the number of invitations mailed 2112, the number of RSVPs received 2114, and the actual attendance of the meeting 2116.

[173]                      Returning to Figure 54, if the user selects the Account Supervisor (“AS”) report hyperlink 1304g, a display as shown in Figure 74 may be displayed to the user. Figure 74 is an embodiment of an AS report. The AS report may include the meeting code 2202, the meeting time and date 2204, the meeting status 2206, speaker status 2208, the date the request was received 2210, the date the speaker was confirmed 2212, the date the contract for the speaker was returned 2214, the date the invitations for the meeting were mailed 2216, the date a seven day report was sent 2218, and the date that the roster was retained 2220.

[174] It is an aspect of the present invention that a financial report concerning a particular program or series of meetings may be generated for a user. An embodiment of a financial report is provided in Figure 75. Figure 75 illustrates a screen shot of a financial report wherein only a portion of all the financial topics is visible 2302. Table 1 lists exemplary titles for financial perimeters associated with the meeting that may be detected in Figure 75. The financial report may display the Table 1 parameters for each individual meeting project, for example, and may total the amount to provide the user an estimate of meeting costs and expenses.



|  |  |
|--|--|
| <b>[175] Financial Report Headings</b> |  |
| [176] meeting code                     | [177] speaker airfare                      |
| [178] meeting date                     | [179] speaker car                          |
| [180] business unit                    | [181] venue deposit                        |
| [182] Geography                        | [183] District business manager<br>expense |
| [184] meeting type                     | [185] freelancer fees                      |
| [186] meeting format                   | [187] grant request                        |
| [188] Host                             | [189] management fee                       |
| [190] Miscellaneous                    | [191] Hotel                                |
| [192] attendee honorarium              | [193] car                                  |
| [194] speaker air fare                 | [195] on-site staff fees                   |
| [196] speaker expenses                 | [197] on-site staff expenses               |
| [198] speaker honorarium               | [199] supplies                             |

|       |                          |       |                               |
|-------|--------------------------|-------|-------------------------------|
| [200] | Entertainment            | [201] | postage and attendee expenses |
| [202] | venue room fees          | [203] |                               |
| [204] | outside audiovisual fees | [205] |                               |
| [206] | F & B fees               | [207] |                               |
| [208] | venue deposit            | [209] |                               |
| [210] | speaker honorarium       | [211] |                               |

Table 1

[212] Reports may also be presented as shown in Figures 76 and 77. In Figure 76, there is shown a program costs screen shot, which may set forth the costs associated with a given program. In Figure 77, there is shown a report of representative agreements received. As may be seen in Figure 77, itemization of representatives and a representative agreement received may be tabulated.

[213] Figure 78 illustrates an embodiment of the present invention in which the user selects the fulfillment menu button 2042 and selects from the drop down menu 2404 a meeting in which letter

or e-mail correspondence needs to be generated. Figure 79 illustrates fulfillment items for a particular project. These fulfillment items may include such meeting-specific items, for example, as a comma separated value file 2502, an attendee separated value file 2504, a venue confirmation 2506, a cover memo 2508, a cancellation fax 2510, a cancellation notice 2512, an invitation 2514, a speaker confirmation 2516 and 2518, an invitation 2520, a thank you letter for a local speaker 2522, a national single speaker thank you letter 2524, a reminder fax 2526, and/or an request for receipt 2528. The user may use fulfillment items to simplify and efficiently develop correspondence necessary to execute plans for the meeting or project, or to communicate with persons affiliated with an event or series of events, such as speakers, attendees, venues, A/V suppliers, and/or hosts.

[214] In an exemplary operational embodiment, the planning system may be divided into clients, wherein each client may log in individually, and within each client may be present, for example, one or more brands related to that client, or one or more projects related to that client, or related to a particular brand of that client, for example, as discussed hereinabove, and as illustrated in the flow diagram of Figure 80. Thus, upon logging in 2602, a user may be

able to, for example, set up a new client or subclient, or select an existing client 2604, wherein a particular user may log into multiple clients within the planning system. Following selection of a client 2604, a user of the planning system may be able to, for example, set up a new brand 2606, or select an existing brand 2607, or set up a new project 2608, or select an existing project 2609.

[215] A project may include, for example, at least one meeting which may be selected as all, or a portion, of that particular project. Upon selection of a project 2608, or a meeting, or upon selection to set up a new project or meeting, the user may be presented with an add/edit meeting selector. The user may add or edit a meeting through this selector 2610, or, in an alternative embodiment, a meeting may be automatically added or selected in accordance with, for example, a received e-mail, a received telephone call, or a received fax. The add/edit meeting module may allow a user to track and/or modify a meeting in accordance with a meeting status, for example. The add/edit meeting module may allow, for example, a comprehensive review of the meeting, a review of meeting status, a comprehensive venue status, a comprehensive audio visual status and/or a target attendee status review, as discussed hereinabove. Each of these portions of the module may

be selectable, such as using a hyperlink, and, upon selection, may evidence varying levels of detail within that portion of the module.

[216] For example, each meeting may be keyed by a meeting code, and each meeting may have a meeting status. The meeting status may be, for example, in progress, set up complete, completed, postponed, not requested, cancelled, or planned but no date supplied, for example. The add/edit meeting selection 2610 may additionally evidence the meeting date, the meeting time, the meeting business unit such as business units within the client, the geographic location of the meeting, and additional information directed to the desirable attendees for that meeting 2612. Selection of the add/edit meeting module may additionally allow for selection of the host, a point person, a moderator, a contact name or listing, target listings, moderators, speakers, or attendance rosters 2630.

[217] In this exemplary embodiment, upon selection of, for example, the venue, the venue name, address, telephone and/or fax number, contact name, and/or venue notes, may be displayed or may be edited. Additional information related to the venue may be viewed, such as the contract status with the venue, which may be, for example, unavailable, reserved, contract sent, contracted, or initial request made, for example. Additionally, the meeting room or

area of the venue may be selected, as may be the capacity or cost, such as per person, of the venue. Thereby, aspects of the venue may be reviewed and/or edited by authorized users 2620 of the planning system. Additionally, authorized users may, for example, record payment to the venue, or other owed expenses, such as by credit card, or printing of a business check. A user may additionally make venue arrangements for audio visual equipment to be supplied to the venue, such as the audio visual supplier, an audio visual contact name, supplier name, supplier location, or supplier contact information. Additionally, alternative audio visual suppliers may be entered.

[218] Selection 2610 of the add/edit meeting module may additionally allow for the selection of particular functions for the speaker and/or moderator. For example, information may be tracked for the speaker and/or moderator, such as a record of whether a speaker has provided personal information, such as a personal biography, curriculum vitae, speaker honoraria amount, speaker airline preferences or expenses, car, hotel, food, or other travel preferences or expenses. Other expenses related to the meeting and/or the speaker may be tracked, such as room fees, restaurant charges, audio visual charges, entertainment charges, other

miscellaneous expenses, and each expense tracked by the add/edit meeting module may be interoperable with the accounting systems apparent to those skilled in the art, such as Microsoft Quicken or Microsoft Great Plains, for example.

[219] Further, the add/edit meeting selection 2610, as set forth hereinabove, may allow for the tracking for particular attendee functions, such as invited participants, acknowledged participants, payment of acknowledged participants, tracking of accounts receivable, and tracking of accounts paid. Overall, a total attendee or guest count may be provided, such as in order to select numbers of handouts necessary for availability during a meeting. Particular attendees may be tracked using the add/edit meeting module, such as overall attendance or attendee status, which may include yes, no, wait listed, cancel, or invited, whether or not an attendee actually attended, whether an attendee is, or is to be, removed, and whether particular attendee confirmations are to be made available or have been provided by a confirmation fax, mail, e-mail, invitation, telephone call, or other methodology. All attendance information may be conveniently provided in, for example, a summary table.

[220] In this exemplary operational embodiment, the planning system may additionally include tracking for all persons and

places involved with a particular project, brand, client, or multiple clients, within the planning system. For example, an add/edit person or place module may be included within the system, that may allow the system to overall track 2640 particular persons, venues, audio visual suppliers, hosts, speakers, moderators, users, and/or attendees. For example, for each person or venue, or vendor entered into the system, contact information may be available. This contact information may include, for example, names, addresses, multiple telephone numbers, mobile telephone numbers, fax numbers, emergency contact information, or additional information, such as comments, that will allow for contacting of particular contacts within the person, company, or venue or vendor data base. It will be apparent to those skilled in the art that multiple fields may be available for entry of particular information, such as fax numbers for home, business, or other, or multiple name fields, which may allow, for example, the selection of first, last and middle names, or the selection of company names. Additionally, drop-down menus may be provided for selection of particular information within the contacts listing, such as suffixes to follow particular names, such as MD, Sr., Ph.D., Pharm D., RN, APRN, PA, DO, or Esq., for example. Further, additional fields may be added, or may be available, for entry of information specific to particular projects, meetings, brands, or



clients. For example, target profiles for particular meetings may include, for example, education level information, ME numbers, DEA numbers, AOA numbers, district numbers, social security numbers, or other necessary or desired information. Further, where available, electronically available information may additionally be provided in the contacts listing such as electronic, or scanned, business cards or other specialized or specialty information, such as a speaker curriculum vitae or biography.

[221] Variations of the fields set forth hereinabove, or additions made thereto, may be monitored 2660 by a permission level security interface. For example, a field sales representative may be entitled to access, or be allowed to modify, only particular information related to a particular meeting. Other information may not be added or edited by that field representative, and this accessibility may be controlled by a security interface, as will be apparent to those skilled in the art. Further, all or a portion of the information passed from a remote planning system to a local interface may be secure information, such as by data encryption apparent to those skilled in the art.

[222] In this exemplary operational embodiment, a user entering information may be allowed to enter information, or may be

prompted to enter particular information, such as wherein a meeting profile, person profile, or place profile, has been created, and particular information has not been entered. For example, upon completion of a meeting request, the planning system may prompt a field sales representative to create a target list for that meeting, wherein a target list has not yet been created. The field representative may then either enter a target list as part of selection 2630, or select that a target list will be entered at a later date. This target list may then be entered, such as, for example, by a download in the entirety from, for example, a Microsoft Excel spreadsheet, or the information may be, at that date or a later date, hard coded manually into the system.

[223] Further, particular information items may be provided to the user filling out a given request, as the request is being filled out. For example, the system may provide 2650 specific instructions that are applicable to particular events or event types. For example, the marketing department within a particular client may limit attendance to 15 attendees per meeting, such as due to marketing budgetary constraints. In such an instance, wherein a meeting has been set up using the add/edit meeting module, and it is entered that the marketing department is to fund the meeting, a message box

may appear for the user that instructs "at marketing funded events, attendance is limited to 15 per meeting, and attendees must have signed consulting agreements, may not bring spouses, and will not be paid honorarium. Further, the venue budget is limited to \$2000 per meeting, and any excess must be entered into the 'additional expense field.'" The user may be given the option to accept or reject these instructions. Thus, the planning system may include a plurality of business rules, that may be applied to particular meeting, projects, brands, or clients. These business rules may be entered by clients, field representatives, planning system administrators, or any authorized user.

[224] Further, such as within the business rules, the planning system may include a hierarchy, such as a hierarchy through which meeting requests, or expense requests must pass, as illustrated in the block diagram of Figure 81. In such an embodiment, a meeting request may be generated, and may be passed for approval, such as automatically by e-mail, to a client administrator. Alternatively, expenses within the meeting request may be passed to an accounting department within the client for approval. In such an exemplary embodiment, upon approval by the accounting department, check requests may be automatically

generated, such as by interface of a check generation software to the planning system approval methodology, thereby generating checks without any human interaction other than approval of the expense. Alternatively, as will be apparent to those skilled in the art, a check request may be manually approved, and a check may be manually generated.

[225] In an exemplary embodiment, business rules may be applied using components and templates, wherein components are the data that has been, or may be captured, and wherein the templates select the manner in which the components will be stored and/or displayed. Figure 82 is a block diagram illustrating the accessing, from a user work station, via the internet, such as Internet Explorer or Netscape, of the planning system databases. The web server that receives the user request, may break the request down into component definitions, and may select a template in accordance with the desired or received component, as illustrated.

[226] Figure 83 is a schematic illustration of an architecture 2902 to employ the planning system discussed hereinabove. The architecture 2902 may include, for example, a rich client 2904, a thin client 2906, a presentation level 2908, a business logic level 2910, and a data level 2912. The data level may include, for example, data

bases, legacy systems, and external applications. The architecture may further employ, for example, a firewall.

[227] This multitier architecture may be developed using, for example, a Microsoft Windows DNA model. The presentation tier may include, for example, user interfaces. The business logic level may include, for example, the business rules discussed hereinabove. The presentation level of the architecture may use, for example, HTML programming for presentation to the user. Further, tools and applications available on the presentation level may use, for example, standard HTML or XML. In the data level, data may be resident, in part, in a database on, for example, a Microsoft SQL server. Universal data access from, for example, the business logic, may be granted through, for example, an ADO. Using a distributed server environment, the planning system may include a plurality of distributed servers. For example, a data architecture, such as a database, may reside on one server, and middle tier components, such as business logic, may reside on a second server. HTML pages, or other user interfaces, may reside on the second server or may reside on a third server. Thereby, no single server experiences overload.

[228]

It will be apparent to those skilled in the art that various modifications and variations may be made in the apparatus and process of the present invention without departing from the spirit or scope of the invention. Thus, it is intended that the present invention cover the modification and variations of this invention provided they come within the scope of the appended claims and the equivalents thereof.